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ABSTRACT

The primary purpose of this manual is to provide a guide to the procedures and techniques to be used in creating an index to minutes. It contains instructions for setting up the index in card form, for determining subject headings, for selecting index card entries, for utilizing the index in card form or converting it to page form, and for transforming a current index into a cumulative index. There are also sections on how to index certain important areas of concern to the board, such as bonds and notes, curriculum, personnel actions including appointments and separations, policy, and reports. It is not possible to determine in advance all the index headings that will be needed. Nevertheless, a list of suggested subject headings (exclusive of proper names) has been prepared. The list is meant to serve as a starting point--to offer some possible subject headings that conform with the usual nomenclature of school programs, records, and activities that are frequent concerns of a board of education. (Author/IRT)

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INDEXING SCHOOL DISTRICT MINUTES

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FOREWORD

Indexing School District Minutes is a new manual developed to aid school district clerks in accomplishing a much needed information control – the indexing of their minute books.

A minute book is an extremely important record, but reference to an unindexed or poorly indexed one can be time-consuming and frustrating. Fully aware of this, many clerks have sought guidance as to how to index their minute books. This manual was prepared to help meet this need.

The manual outlines the procedure to be followed in setting up an index and maintaining it on a current basis as the minutes are prepared, thus eliminating much of the trouble encountered in attempting to index a completed minute book. However, the procedure can readily be adapted to indexing completed books.

This manual is an adaptation of A Basic Index For Minutes, published several years ago for municipal government clerks and used as a guide by many school district clerks. The procedure used in setting up an index remains basically the same, but the sections on how to index particular actions of a board of education, the suggested subject headings, and the examples used have all been substantially rewritten to reflect school district responsibilities and practices.

Development of this publication was largely the work of John A. Leith, Senior Public Records Analyst, Local Records Section. In addition, the contributions made by several school district clerks for their knowledge and experience in this technical field are gratefully acknowledged.

Edward Weldon
State Archivist

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DEFINITIONS

For the purpose of this manual the following definitions apply. Several of the definitions are taken from "Indexing: Principles, Rules and Examples," published January 1957 as Bulletin Number 1445 by The University of the State of New York.

Action -- Any matter of business or other occurence recorded in the minutes.

Cross-reference -- A cross-reference refers the searcher or user of the index: (1) from a possible heading under which no page references are given to the chosen heading where they may be found ("see" reference); or (2) connects headings which represent allied subjects or which contain related entries ("see also" reference) (Note: See the section entitled "Preparing Cross-Reference Cards" on page 17 for the proper procedure.)

Entry -- The word, phrase, or phrases expressing the action taken on a subject together with the page reference indicating where it is found in the text of the minutes.

Heading -- The word or words chosen to express the subject or idea. In this index the heading is placed at the top of the index card and thus determines its alphabetic position in the index.

Index -- An alphabetical arrangement of subjects indicating the volumes and pages where various aspects of a subject are treated. An index may be in the form of a list or card file.

Modifier -- A word or words added to a subject heading to make it more specific or more descriptive.

Subject -- Any event, place, person, fact, relation, topic, idea, or whatever is an object of thought and may become an object of search.

INTRODUCTION

The purpose of an index is to facilitate reference to the contents of a body of recorded information. Therefore, the information must be carefully analyzed and classified by subject matter. Headings should be assigned that are concise, accurate, and familiar to the user. It is essential that a reference point exists in the index for every subject involved in each action of the board of education.

The primary purpose of this manual is to provide a guide to the procedures and techniques to be used in creating an index to minutes. It contains instructions for setting up the index in card form, for determining subject headings, for selecting index card entries, for utilizing the index in card form or converting it to page form, and for transforming a current index into a cumulative index. There are also sections on how to index certain important areas of concern to the board, such as bonds and notes, curriculum, personnel actions including appointments and separations, policy, and reports.

It is not possible to determine in advance all the index headings that will be needed. Nevertheless, a list of suggested subject headings (exclusive of proper names*) has been prepared by examining the minutes and indexes of some school districts and by using reference material of the State Education Department such as "A Basic School Filing System" and the "Records Retention and Disposition Schedule" which refer to records of school districts. The list is meant to serve as a starting point — to offer some possible subject headings that conform with the usual nomenclature of school programs, records, and activities that are frequent concerns of a board of education.

*A proper name is the name of a person (John Smith), a group of persons (American Legion), a firm (Johnson Manufacturing Company), a place (Broad Street), or thing (War Memorial Stadium). A proper name is always capitalized.

THE IMPORTANCE OF INDEXING

Only a small number of school district clerks has indexed their minute books. Of those who have not, some probably feel that they lack the technical knowledge of indexing necessary to do the job. But it is probable that the majority hesitate to index because of the volume of information contained in each book and the amount of time required.

Yet most clerks will agree that indexes are badly needed. The minutes of each board meeting grow larger and more complex as the responsibilities of the district increase and new educational programs are implemented. To maintain control of this expanding information and insure accurate, quick access to it, a clerk requires an adequate index.

In addition, the "Freedom of Information Law," enacted in 1974, requires that:

> Each agency, in accordance with its published rules, shall make available for public inspection and copying: ...
> c. minutes of meetings... (Sec. 88 subd. 1 of the Public Officers Law).

Queries from the public will often be for specific topics or actions. Reference, inspection, and copying will be greatly simplified and require less staff time if the minutes are indexed.

The method of indexing outlined in this manual is designed to furnish clerks with technical knowledge and with a list of suggested subject headings. By following this step-by-step method of indexing the minutes as they are prepared, a clerk can maintain an accurate, current, and continuing index and escape the time-consuming and difficult indexing of a completed minute book. The reason for this is simple. It is easier and quicker to index the minutes of one meeting than to index an entire volume at one time.

A prerequisite to indexing is that the pages of a minute book be numbered. If they are not, the page numbers can easily be inserted in consecutive order by hand or with a numbering machine. Several examples of numbering systems are shown in Appendix B, pages 56 and 57.

COMPILING A CARD INDEX

METHOD

The steps required to make a card index of the contents of a minute book are summarized below:

1. Assemble the necessary materials as described on pages 3 to 6.

2. Prepare a set of first position guide cards, as explained on page 6 , to designate the alphabet. Insert the guide cards in a card drawer of suitable size. (As the index develops it will probably be advantageous to prepare and insert third position guide cards, as explained on page 5 , to indicate major subjects.)

3. Take the minutes to be indexed. Carefully read an action of the board and determine what was its subject or subjects. Refer to the section "Determining Subject Headings," on page 7 for assistance.

4. For each subject determined prepare an index card with heading and entries as explained in the section "Preparing Index Cards," page 12. Insert the index card in its appropriate place in the card drawer.

MATERIALS NEEDED

Ease of preparation and reference is important if an index is to be a useful working tool. Four types of materials -- index cards, guide cards, end guides, and a card file drawer -- are required.

Index Cards

Index cards are used for recording information when indexing minutes because it is believed they are easier to prepare and to use than an index in book form. Although a book form of index may be more compact, cards have the advantage of permitting the maintenance of the alphabetic arrangement of an index regardless of the number or variety of subjects indexed. At the same time, cards not only permit indexing on a current basis but can also be saved and interfiled to form a cumulative index covering a long period of time.

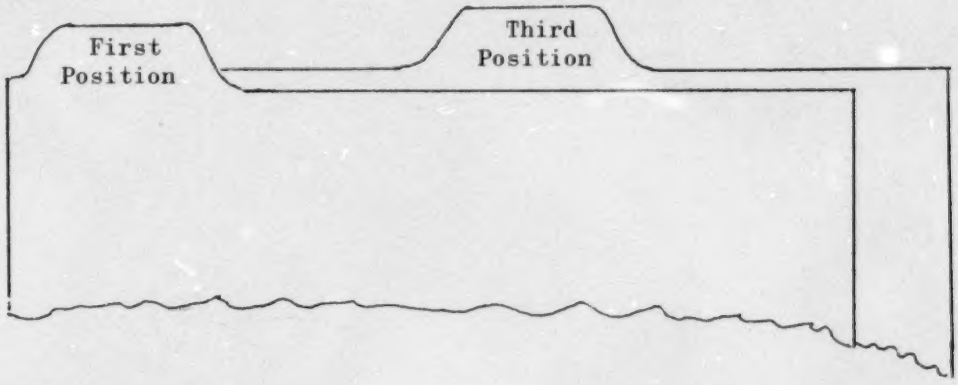
A 4" x 6" white unruled card is satisfactory. While cards of larger size may be used, cards smaller than 4" x 6" are often difficult to write or type on and may not provide sufficient space for making entries. To avoid loss of cards, the index cards may be punched so that they can be held in place in the file by a drawer rod. Cards with rounded corners will outlast square-cornered cards since they will not become bent or dog-eared, and, in general, will be easier to use. Cards with rounded corners are used in the illustrations in this manual. However, if these cards are not readily available from your supplier, cards with square corners will work satisfactorily.

A 4" x 6" card with rounded corners and punched for a drawer rod is illustrated below. Each subject — whether it is one included in the common subject headings listed on pages 20 to 26, a proper name as defined in the footnote on page 1, a building, another district or nonpublic school, or a governmental unit — will require at least one card of this type. Refer to page 12 for instructions on preparing index cards.

Guide Cards

Guide cards are necessary to break down the index into readily discernible units. The ordinary "ABC" set of guide cards is generally unsuitable for indexing purposes as the tabs are scattered across the face of the card in five positions thereby making reference to the index cards difficult. For the index described in this manual, blank guide cards with fifth cut tabs in the first and third positions are recommended. They should be of good quality card stock and punched to accommodate a drawer rod if one is used. A special order to a supplier is generally required to obtain guide cards of this type with tabs in only the first and third positions. However, blank guide cards with fifth cut tabs are commonly available at stationery suppliers in packets of 100 containing 20 guides in each of the 5 tab positions. Blank guide cards of this type are quite inexpensive when sold in packs of 100. The fifth position guide cards in these sets may be reversed and used as additional first position guide cards. The second and fourth position guide cards in the sets should be discarded or used for other purposes.

The position of the guide cards as they appear in the filing drawer is illustrated below.



The first position guides are used to break down the alphabet, A, B, C, and so on. It is generally satisfactory to combine the following letters on one guide each: J-K, P-Q, U-V, and XYZ. Thus 21 first position guide cards are needed.

Third position guides are used to indicate major subjects such as APPOINTMENTS, BONDS AND NOTES, BUDGET, CURRICULUM, ELECTIONS, PERSONNEL, POLICY, REPORTS, and SEPARATIONS. Individual buildings and academic departments should also have guide cards. Local reference requirements will dictate the number of third position guide cards needed. However, it is recommended that not more than 15 third position guides per 1,000 index cards be used, as a greater number of guides will interfere with easy access to the cards for filing and searching. It is

important to insert only a sufficent number of guide cards tc speed reference to the index. Do not insert so many guides that "the forest can't be seen for the trees."

Preparing Guide Cards

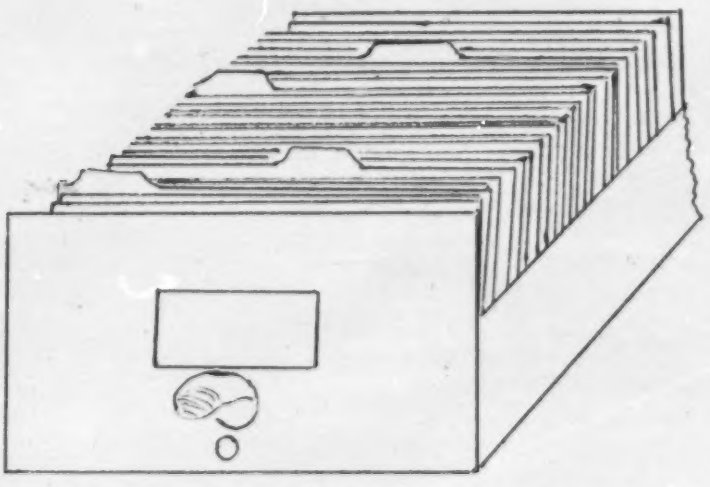
Guide cards are simple to prepare. The letters of the alphabet and the major subject headings may either be printed in capital letters with black ink directly on the guide card tab or be printed or typed on adhesive labels which are available in various sizes in pad form or in continuous strips in roll form.

End Guides

End guides are similar to the guide cards described above but are usually of a distinctive color from these guide cards and are without tabs. They can be purchased from most stationery suppliers. End guides should project approximately 1/8 inch above the index cards. Thus if 4" x 6" index cards are used, the dimensions of the end guides should be 4 1/8" x 6".

End guides are used to indicate the end of a series of index cards designated by a third position guide card. For example, if a third position guide has been used to designate the subject CURRICULUM, an end guide should be inserted immediately following the last index card related to this subject to point out to the user of the index that all of the cards between the third position guide and the end guide pertain only to the subject CURRICULUM.

The completed index file drawer with guides and cards in place should look like this:



DETERMINING SUBJECT HEADINGS

To index a minute book it is necessary to determine the subject or subjects of each of the actions recorded in the minutes. One action may have more than one subject since a subject is any person, place, fact, topic, event, or idea that is likely to be the object of search when an index is consulted. A criterion of a good index is that reference to an action recorded in the minutes may be found not only by the person who did the indexing but also by others who may search for what they consider an appropriate subject heading. It is essential, therefore, that the indexer be thorough, not seek shortcuts, and include all subjects that may reasonably be expected to be the object of search.

It is essential that subject headings be assigned systematically and consistently. To assist in this, a list of commonly used subject headings has been compiled and is found on pages 20 to 26. The section "How to Index Some Major Subjects" presents detailed methods of indexing some major areas of concern to the board. Subjects that are proper names should be indexed in accordance with the rules for alphabetizing proper names given in Appendix A, page 55.

The following is an analysis of an action of a board of education that illustrates how to determine appropriate subject headings. As recorded in the minutes the action reads:

> The clerk presented a petition from the Blue Ridge Improvement Association, forwarded by J.F. Redfield, Secretary, and dated January 18, 1974, urging that the new elementary school proposed for that area of the city be constructed as soon as the new housing developments under way there indicate a substantial increase in school population.
>
> Mrs. Frixel moved and Mr. Hart seconded the motion that the clerk be authorized and directed to notify the Blue Ridge Improvement Association that a site on the corner of Park Street and Emerson Avenue has been approved and preliminary steps have already been taken to submit to the voters the question of issuing bonds for the construction of a new elementary school in that section of the city.

The subjects of the above action are analyzed below:

1. One of the subjects is the proposed elementary school building. Reference to the section "How to Index Buildings" on page 30 indicates that the proper subject would be the building name or, as in this case, a readily identifiable temporary designation such as: BLUE RIDGE PROPOSED ELEMENTARY SCHOOL.

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An alternative method would be to index under the heading BUILDINGS, CONSTRUCTION. Using this method all actions that concern construction of new buildings would be indexed under one heading. Actions that concern existing buildings would be found under their specific name.

When a building is completed an index card is prepared for its new name; for example, BLUE RIDGE ELEMENTARY SCHOOL. A "see-also" reference is entered referring the searcher to either BUILDINGS, CONSTRUCTION or BLUE RIDGE PROPOSED ELEMENTARY SCHOOL, depending on which method was used, for prior entries.

2. This action of the board was initiated by a petition. Petitions and correspondence should be indexed by the subject or subjects and the writer or submitter. In this case, the petition was from the BLUE RIDGE IMPROVEMENT ASSOCIATION. It is not necessary to index under both the association name and the name of the person who submitted it, although this may be done. If it is desired to also index the writer, or if the communication was from an individual rather than an association, an index card would be prepared for J.F. Redfield. Referring to Appendix A which gives rules for alphabetizing proper names, the indexer will find that Mr. Redfield is alphabetized as REDFIELD, J.F. and the association in its regular order -- BLUE RIDGE IMPROVEMENT ASSOCIATION.

3. A fourth possible subject is ELEMENTARY SCHOOLS. This is a case where the indexer must exercise judgment to decide if an entry is required under that heading. The need for an elementary school is the purpose of the petition. The indexer may feel that this is adequately covered by the entry described in (1) above, or he may feel that the index would be searched under ELEMENTARY SCHOOLS to find evidence of community concerns, studies, and board actions to meet new needs.

Note that the board's response to this petition includes mention of two prior actions: site approval and preliminary steps to a bond issue. Both of these should have been previously indexed but no new entries are required as the board is merely citing these previous actions in its reply.

To illustrate the above example, properly prepared index cards for each subject mentioned -- BLUE RIDGE PROPOSED ELEMENTARY SCHOOL; BLUE RIDGE IMPROVEMENT ASSOCIATION; REDFIELD, J.F.; ELEMENTARY SCHOOLS; and BUILDINGS, CONSTRUCTION - are shown on the next page. Instructions for preparing index cards begin on page 12.

NOTE: These examples assume that the action was recorded in volume 22, page 26 of the minutes, and do not show other entries already existing on the cards.

1973-74 BLUE RIDGE PROPOSED ELEMENTARY SCHCOL

petition for, Blue Ridge Development Association 22:26

1973-74 BLUE RIDGE IMPROVEMENT ASSOCIATION

elementary school, petition for 22:26

1973-74 REDFIELD, J.F.

elementary school, petition for 22:26

1973-74 ELEMENTARY SCHOOLS

Blue Ridge Improvement Association petition 22:26

1973-74 BUILDINGS, CONSTRUCTION

Blue Ridge Proposed Elementary School, petition for 22:26

Use of Modifiers

Modifiers are used to differentiate between subjects that are part of a general class or major subject. For example, all revenues that come to a school can be grouped under the heading INCOME. Adding appropriate modifiers; such as STATE AID, TAXATION, TUITION, etc., separates income by source and gives more specific reference points. A series of cards is created, each starting with INCOME, so that a searcher would find all references to school income easily. It would not be necessary to search through the entire index for various sources of income, possibly missing some that had been indexed under such headings as RENTALS or SALE OF PROPERTY. Cross-reference cards may be necessary for commonly used phrases; such as, FEDERAL AID or STATE AID, to direct the user to the proper listing under INCOME. (See "Preparing Cross-Reference Cards," page 17.). Other examples of the use of modifiers for this purpose are found in the sections on how to index BONDS AND NOTES, BUILDINGS, PERSONNEL, and POLICY.

Modifiers are also used to clarify a heading that otherwise is ambiguous or too general to be meaningful. Examples are CLERK, SCHOOL DISTRICT and SITES, POSSIBLE SCHOOL. In these cases, the important words under which the actions should be indexed are CLERKS AND SITES, but a modifier is needed to tell which clerk or which type of site.

Annotation of Minutes

It is recommended, and customary with many districts, that the minutes be annotated in the margin with key words that identify the subject of the action or discussion. The agenda for a board meeting is sometimes similarly annotated.

These annotations should conform as closely as possible to the subject headings used in the index. They do not have to be exactly the same, but the key words used should be similar enough to quickly lead the searcher, working from the index card, to the relevant action.

Conversely, the annotation will quickly cue the indexer to subjects to be indexed and even help provide appropriate entries. Therefore, annotations of minutes and agendas should be compatible with the indexing program.

SELECTING ENTRIES

Index card entries should be brief and accurate. Each entry must be complete enough to describe the action recorded in the minutes. However, do not attempt to include so much information in the entry that the user of the index feels it unnecessary to refer to the actual minutes. Keep in mind that the purpose of an index is merely to assist in finding information — to point out where certain information may be found. It is by no means a substitute for the minutes which are the official definitive record.

In selecting entries, strive for key words that succinctly describe or convey the meaning of the text. Avoid vague, general terms that can't stand alone.

For example, an entry such as "certain transportation equipment" under the heading "TRANSPORTATION, PURCHASES" is meaningless. The indexer must define what is meant by "certain transportation equipment" and, in addition, describe the action that has taken place. If the action in this case was a resolution requesting proposals to be submitted on a station wagon, the entry "certain transportation equipment" is obviously too general. On the other hand, an entry such as "station wagon, proposals requested" is both reasonably brief and absolutely accurate.

Although the choice of words used in each entry will, of course, depend entirely upon the text of the minutes, certain key words will undoubtedly be used rather frequently. Among these key words are: hearing, estimates, contract, proposals, bids. Note, however, that none of these key words are sufficiently descriptive to be used as an entry without modification. It is necessary for the indexer to construct each entry in such a way that the action taken on the subject of the entry is described. For example:

A "hearing" is ordered, held, adjourned, postponed.

"Estimates," "bids," or "proposals" are requested, invited, called for, received, rejected.

A "contract" is awarded, refused, assigned.

Often it will be necessary to invert or to rearrange the words of an entry from their conventional order so as to place the key word or words at the beginning of the entry. For example:

preliminary budget, superintendent submits
NOT
superintendent submits preliminary budget

Citing Volume and Page References

In order to index information recorded in book form it is necessary to refer to the page number of the text. When the action is on more than one page, cite the first and final page numbers; for example, 10-12, or 243-46.

Since minutes are of a continuing nature, it is inevitable that eventually the index will cover more than one volume. When this occurs, separate the volume and the page number cited by a colon; for example, 2:140 (volume 2, page 140). This is the method used in the examples shown in this manual. Other methods of volume and page identification are discussed in Appendix B, page 56.

PREPARING INDEX CARDS

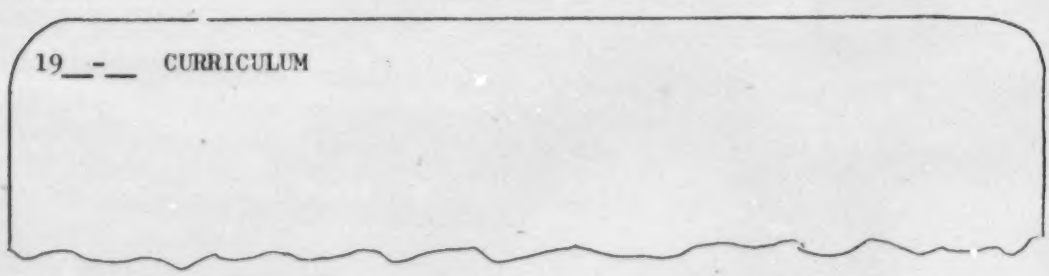
ENTER INFORMATION ON ONLY ONE SIDE OF AN INDEX CARD. The heading and entries should be concise and uniform in format and spacing. Each entry must be complete enough to identify the action but not so complete as to make reference to the actual minutes appear unnecessary. To repeat, the purpose of an index is merely to assist in finding information, not to substitute for the information contained in the minutes.

Index cards are prepared as follows:

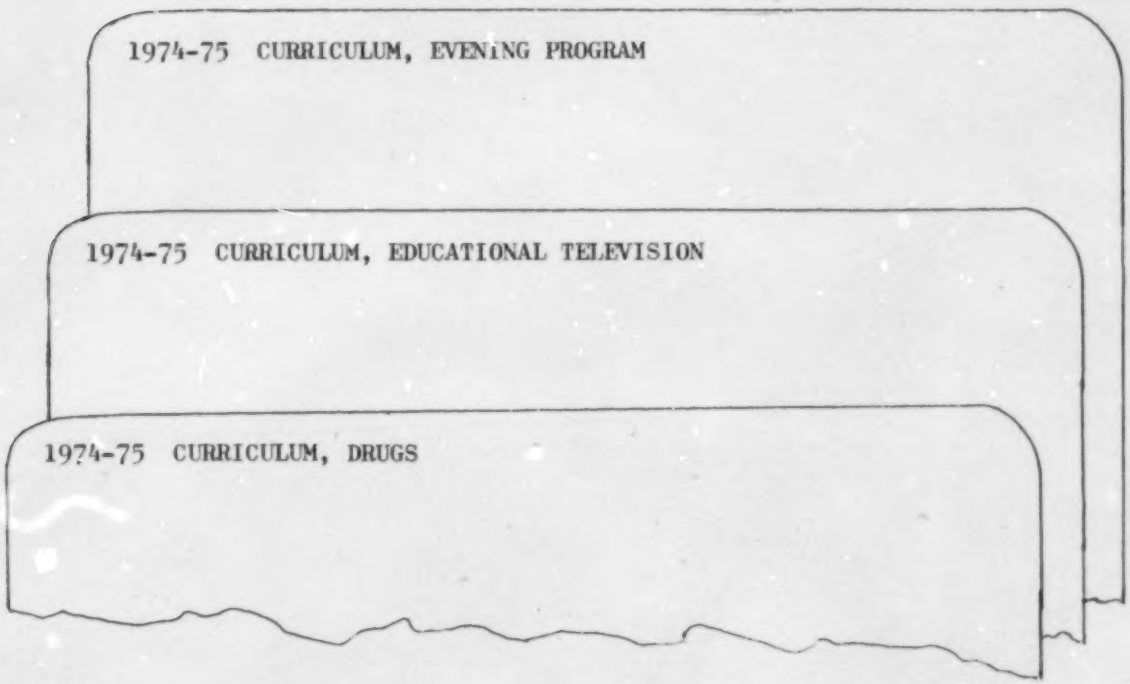
Inserting the Heading

Three spaces from the left margin insert the school year or calendar year, depending on how the minutes are organized. The school year will be used in all examples in this manual. TYPE HEADING IN CAPITAL LETTERS.

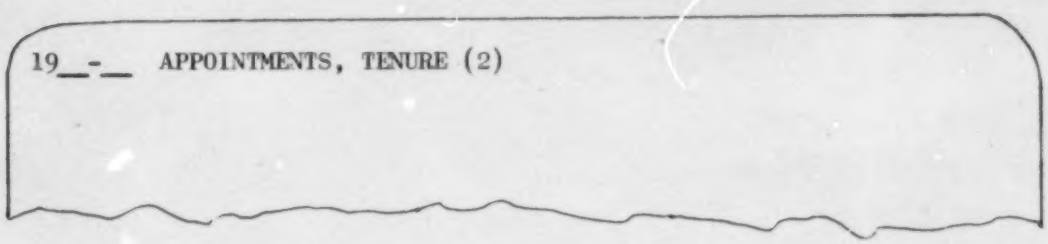
Example.



If a more descriptive heading is desired, especially for cards that make up a series, follow the principal word or words of the heading with a comma and add the modifier as shown in the examples below.



If more than one index card per heading is required, type the heading that is on the first card on each additional card. To indicate that there is more than one card per heading, number each card consecutively 1, 2, 3, etc., by placing the appropriate numeral in parentheses 2 spaces to the right of the last letter of the heading. An example is shown below of the second card prepared for a heading.



Inserting Entries and Volume and Page References

It is not necessary to prepare an individual card for each action recorded in the minutes. Once an index card has been prepared for a subject, entries are entered on the card in chronological order as illustrated by the following examples.

Example 1.

This example has a single subject, BUDGET. The minute book actions summarized here are typical. In actual practice each entry would be entered on the index card immediately upon approval of the minutes of each meeting. The card reproduced here was constructed from the following actions, which represent only part of a board's usual procedure in preparation and adoption of a budget.

Budget calendar and folders were set up at the meeting of July 9 (volume 24, page 7).
Preliminary budget estimates of major building repairs and alterations and transportation replacements at the meeting of August 13 (volume 24, page 21).
Chief school administrator is instructed to advise staff to prepare budget at the meeting of September 10 (volume 24, page 36).
Preliminary staff budget submitted by chief school administrator at the meeting of December 9 (volume 24, page 64).
The preliminary budget adopted as final budget for submission to voters at the meeting of April 11 (volume 24, page 101).
Budget adopted by voters at annual district meeting of June 20 (volume 24, page 127).

19__-__ BUDGET

budget calendar	24:7
preliminary estimates	24:21
preliminary budget, chief school administrator to prepare	24:36
preliminary budget submitted to board	24:64
preliminary budget adopted for submission to voters	24:101
budget adopted by voters	24:127

Explanation:

Begin first entry 2 lines below the heading. The first letter of the entry should be in alignment with the first letter (exclusive of the date) of the heading, as shown above. Set the tab stop on the typewriter for 10 spaces from the right edge of the card for volume and

page citation. Use a colon to separate volume and page as shown in the example. (Refer to Appendix B, page 56 for other methods of citing volume and page.) Begin each entry on a new line. If the entry requires more than one line, indent the second and succeeding lines 3 spaces. Do not capitalize the first word of an entry unless it is a proper name. Omit the period at the end of the entry.

Example 2.

A second example shows three actions of the board, which, although they concern only one person, have more than one subject. What is subject heading on one index card becomes an entry on another. In the minutes of January 28, a report of an injury to an employee was recorded (volume 12, page 68). At the May 3 meeting Brown was promoted to Assistant to the Business Manager (volume 12, page 228). Two months later, at the July meeting, Brown's letter of resignation was accepted (volume 12, page 289).

The subjects of the above example are:

1. A proper name. The rules for alphabetizing proper names (see Appendix A) indicate that George D. Brown is alphabetized as BROWN, GEORGE D.

2. An injury. Referring to the list of suggested subject headings beginning on page 20, the indexer will find INJURIES listed.

3. An appointment. Again, APPOINTMENTS, PROMOTION is designated a subject heading in the list beginning on page 20.

4. The fourth subject is BUSINESS OFFICE, as Brown is appointed to the Business Office.

5. A resignation. This subject, as will be noted in the list of suggested subject headings (page 24), is cross-referenced to SEPARATIONS.

These subjects are indexed on cards as follows:

19__-__ BROWN, GEORGE D.

injury	12:68
appointed Assistant to Business Manager	12:228
resignation	12:289

NOTE: The section, "How To Index Personnel," suggests that creating an index card for each employee could result in a too voluminous index. However, a district may wish to have index cards for certain important officers, or a small district may choose to index all employees. The example above shows how such a card would appear.

16

19__-__ INJURIES

Brown, George D. 12:68

19__-__ APPOINTMENTS, PROMOTIONS

Assistant to Business Manager
Brown, George D. 12:228

OR

Brown, George D., Assistant
to Business Manager 12:228

19__-__ BUSINESS OFFICE

Assistant to Business
Manager appointed 12:228

19__-__ SEPARATIONS

Assistant to Business
Manager Brown, George D. 12:289

OR

Brown, George D., Assistant
to Business Manager 12:289

MAKE ENTRIES ON ONLY ONE SIDE OF AN INDEX CARD

PREPARING CROSS-REFERENCE CARDS

Cross-references are a necessary aid in locating subjects which could be indexed and sought under more than one heading. As explained in "Definitions," they are of two types.

1. The "see" cross-reference directs the searcher from a possible heading to the chosen heading where entries and page references are found.

2. The "see also" reference directs the searcher to additional information related to the subject.

The "See" Cross-Reference

The proper indexing of minutes requires frequent and consistent use of this type of cross-reference when there is more than one heading under which a subject could properly be indexed. Some of these are indicated in the list of common subject headings beginning on page 20.

Another important use is when modifiers are used to break down a major subject into specific component areas. For example, it is recommended that the heading SEPARATIONS be used to designate all termination of employment. Then, even if the reason for an employee leaving is not known, the searcher can find a reference under SEPARATIONS. However, "see" cross-reference cards should be created for other possible headings which indicate various types of termination; such as, RETIREMENTS, RESIGNATIONS, DISCHARGES, etc., to refer the searcher to the proper index card.

Below is an example of a "see" cross-reference card.

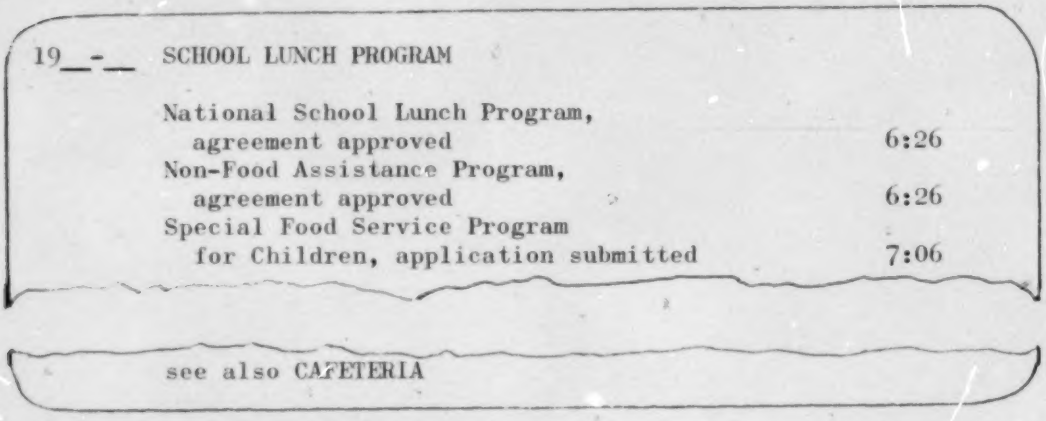
Note that the "see" reference is the only entry on the subject card. The year designation is omitted since cross-references do not change from year to year. Cross-referencing must be consistent whether a new index is created yearly or the current index is incorporated into a cumulative index (see page 49).

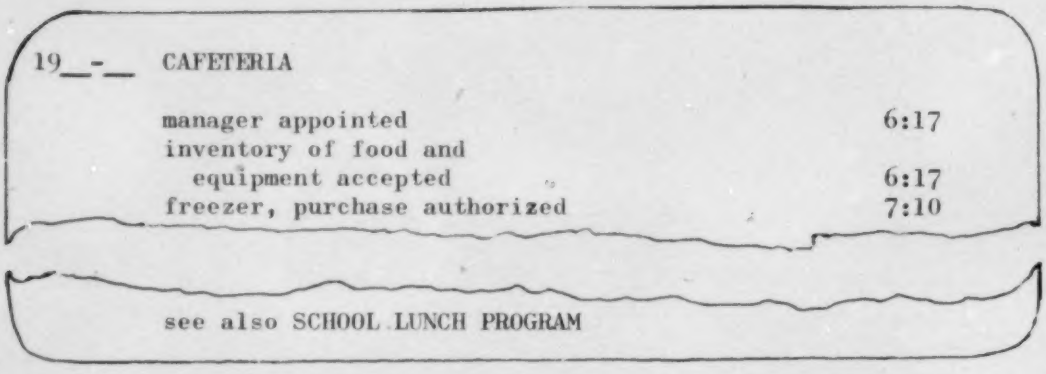
The "See Also" Cross-Reference

Less frequently used, but sometimes essential, is the "see also" cross-reference. It connects headings which represent allied subjects or contain related entries.

There will be actions of the board that specifically concern one subject but will affect another in some way. For instance, the headings CAFETERIA and SCHOOL LUNCH PROGRAM are included in the list of suggested subject headings. Cafeteria refers to the general operation of the school cafeteria; SCHOOL LUNCH PROGRAM refers to federal assistance to schools to implement programs that augment and balance diets of pupils. A searcher might want to investigate both subjects to get a fuller picture of the board's activities in school food service management.

Below are examples of how the two index cards involved would appear. Since the need for cross-referencing may not be apparent until after a number of entries have been made, the "see also" reference should be placed at the bottom of the card.


19__-__ SCHOOL LUNCH PROGRAM
National School Lunch Program, agreement approved 6:26
Non-Food Assistance Program, agreement approved 6:26
Special Food Service Program for Children, application submitted 7:06
see also CAFETERIA


19__-__ CAFETERIA
manager appointed 6:17
inventory of food and equipment accepted 6:17
freezer, purchase authorized 7:10
see also SCHOOL LUNCH PROGRAM

"See also" references are used only to refer from index cards that have entries to index cards that also have entries. Do not create "see also" references in expectation of future needs but only when the need exists. Be sure the heading referred to contains new matter. A searcher does not want to be referred to another index card and find the same actions and pages cited.

The use of this type of cross-reference should be minimal. It is often better to make entries on both subject index cards involved rather than make cross-reference, especially when only a few entries will be involved.

Name or Heading Change

A change in name of a subject for which an index card has been prepared requires a cross-reference card. The searcher must be referred from the old heading to the new and from the new heading to the prior one as entries will exist under both headings. Do not simply change the index card heading and refile when such a name change occurs since the older entries refer to actions in the minutes that used the old name.

The "see also" type of cross-reference is used with the addition of the phrase "for entries through (date)" or "for entries after (date)." In some cases, the name change itself will be an action requiring an entry on both index cards.

Below are examples of properly prepared cards for a name change.

19__-__ MARTIN LUTHER KING MIDDLE SCHOOL

name change	17:23

see also CENTRAL MIDDLE SCHOOL
for entries through June 30, 1971

19__-__ CENTRAL MIDDLE SCHOOL (2)

heating service authorized	16:220
vandalism report	17:01
name change	17:23

see also MARTIN LUTHER KING MIDDLE SCHOOL
for entries after June 30, 1971

NOTE: The cross-reference should be placed at the bottom of the card. The above examples are foreshortened because of space limitations.

A LIST OF SUGGESTED SUBJECT HEADINGS

This list of subjects is intended only as a guide and does not purport to be comprehensive or unchangeable. It represents a compilation of subjects that are frequent concerns of the board of education. An indexer may not use all the headings listed or may wish to change some to conform to local usage. It will certainly be necessary to add headings in order to index actions whose subjects are not included in this list. When doing this it is important to follow the general principles for determining subjects found on page 7. Integrate additional headings into the index by following the rules for alphabetizing given in Appendix A. Possible "see" cross-reference cards are indicated below by an (X)

A

ACCIDENTS
(index also under INJURIES if appropriate)

ACCOUNTS

ADULT EDUCATION
(see discussion of CURRICULUM, page 33)

ANNUAL REPORTS
(see example under REPORTS, page 45)

APPOINTMENTS
(see example, page 37)

APPROPRIATIONS

ARCHITECTS

ASSESSMENT

ASSOCIATIONS
(see specific name of association)

ATHLETICS

ATTENDANCE

ATTENDANCE OFFICER

ATTORNEY, SCHOOL DISTRICT

(X) AUDIO VISUAL
(see EDUCATIONAL COMMUNICATIONS)

A (Continued)

AUDITOR

AUDITS

AUTHORIZATIONS*
(see subject of authorization)

B

BANKS

BIDS*
(see subject of bids)

BOARD OF COOPERATIVE EDUCATIONAL SERVICES (BOCES)

BOARD OF EDUCATION

BOARD OF EDUCATION, MEETINGS

BONDED INDEBTEDNESS

BONDS AND NOTES
(see example, page 27)

BONDS, PERFORMANCE

BONDS, SURETY

BOUNDARIES, SCHOOL DISTRICT

BUDGET
(see example, page 14)

*see page 26

B (Continued)

BUILDINGS
(see example, page 30)

(X) BUSES
(see TRANSPORTATION)

BUSINESS MANAGER

BUSINESS OFFICE

C

CAFETERIA
(see also SCHOOL LUNCH PROGRAM)

CAFETERIA MANAGER

CALENDAR

CENSUS

(X) CERTIFICATION, TEACHER
(see TEACHER CERTIFICATION)

CLERK, SCHOOL DISTRICT

CIVIL DEFENSE

CIVIL SERVICE

COCURRICULAR
(see example, page 33)

CODE OF CONDUCT OR ETHICS

COLLEGES AND UNIVERSITIES

COMMENCEMENT

COMMISSIONS
(see specific name of commission)

COMMITTEES
(see specific name of committee)

COMMUNITY ACTIVITIES

C (Continued)

COMPLAINTS*
(see subject of complaint)

CONFERENCES
(see specific name or purpose of conference)

(X) CONSTRUCTION
(see BUILDINGS, CONSTRUCTION or individual building name)

CONTINUING EDUCATION
(see discussion of CURRICULUM, page 33)

CONTRACTS*
(see subject of contract)

CORRESPONDENCE*
(see subject of correspondence)

CURRICULUM
(see discussion, page 33)

CUSTODIAL SERVICES

D

DENTAL HYGIENE

DENTIST, SCHOOL

DEPARTMENTS
(see example, page 35)

DESIGNATIONS*
(see subject of designation)

DISADVANTAGED PUPILS

(X) DISCIPLINE, STAFF
(see PERSONNEL, DISCIPLINARY ACTIONS)

DISCIPLINE, STUDENT

DISTRICT PRINCIPAL

DISTRICT REORGANIZATION

DISTRICT SUPERINTENDENT OF SCHOOLS

*see page 26

D (Continued)

(X) DRUGS, POLICY
(see POLICY, DRUGS)

DRUGS, PROGRAM
(see NOTE, page 31)

E

EDUCATIONAL COMMUNICATIONS

ELECTIONS

ELEMENTARY SCHOOLS

EMPLOYMENT CERTIFICATES

EQUIPMENT
(see type of equipment)

EQUIPMENT, RENTAL

(X) ETHICS
(see CODE OF CONDUCT OR ETHICS)

EVENING PROGRAM
(see discussion of CURRICULUM, page 33)

EXAMINATIONS

EXPENDITURE

EXTRACURRICULAR
(see example, page 33)

F

(X) FEDERAL AID
(see INCOME, FEDERAL AID)

FEDERAL PROGRAMS
(see also INCOME, FEDERAL AID)

FIELD TRIPS

FINANCE

FIRE DETECTION

F (Continued)

FIRE DRILL

FIRE PROTECTION

FRATERNITIES

(X) FREEDOM OF INFORMATION
(see RECORDS, ACCESS)

(X) FRINGE BENEFITS
(see PERSONNEL, FRINGE BENEFITS)

G

GIFTS

GROUNDS

GUIDANCE

H

HANDICAPPED CHILDREN

(X) HEAD START PROGRAM
(see PRESCHOOL PROGRAMS)

HEALTH SERVICES

HEARINGS*
(see subject of hearing)

HIGH SCHOOL

(X) HOLIDAYS
(see CALENDAR)

I

INCOME
(see Use of Modifiers, page 10)

INCOME, FEDERAL AID
(see also FEDERAL PROGRAMS)

INCOME, RENTAL

INCOME, SALE OF PROPERTY

*see page 26

I (Continued)

INCOME, STATE AID
(see also STATE-AIDED PROGRAMS)

INCOME, TAXATION

INCOME, TUITION

INJURIES
(see also ACCIDENTS)

(X) INSERVICE TRAINING
(see TRAINING, STAFF)

INSPECTIONS

INSURANCE

(X) INTEGRATION
(see RACIAL IMBALANCE)

J

(X) JANITORIAL SERVICES
(see CUSTODIAL SERVICES)

(X) JUNIOR HIGH SCHOOL
(see MIDDLE SCHOOL)

K

KINDERGARTEN

L

LEARNING DISABILITIES PROGRAM

LEASES

LEAVES OF ABSENCE

LEGAL NOTICES

LEGISLATION

LIBRARY

LIGHTING

LITERARY

M

MAIL

MEETINGS
(other than board meetings — index under subject or purpose of meeting)

MICROFILM

MIDDLE SCHOOL

MUSIC
(see discussion of CURRICULUM, page 33)

N

(X) NEGOTIATIONS
(see PERSONNEL, NEGOTIATIONS)

NEWSPAPERS

NEW YORK STATE SCHOOL BOARDS ASSOCIATION

NONPUBLIC SCHOOLS

(X) NOTES
(see BONDS AND NOTES)

(X) NURSERY EDUCATION
(see PRESCHOOL PROGRAMS)

O

OATHS OF OFFICE

OPINIONS OF COMMISSIONER

OPINIONS OF COUNSEL

P

PARENT-TEACHERS ASSOCIATION

PARKING

PAYROLL

P (Continued)

(X) PENSIONS
(see RETIREMENT PLANS)

(X) PERFORMANCE BONDS
(see BONDS, PERFORMANCE)

PERSONNEL
(see example, page 36)

PETITIONS*
(see subject of petition)

PETTY CASH FUNDS

PHYSICAL EDUCATION
(see discussion of CURRICULUM, page 33)

PHYSICIAN, SCHOOL

PLANNING

POLICY
(see example, page 41)

POST-GRADUATE COURSES
(see discussion of CURRICULUM, page 33)

PRESCHOOL PROGRAMS
(see discussion of CURRICULUM, page 33)

PRINCIPAL

(X) PROMOTIONS
(see APPOINTMENTS)

PROPERTY

PSYCHOLOGIST, SCHOOL

PUBLIC RELATIONS

PUPILS

PURCHASES*
(see subject of purchase)

Q

QUOTATIONS*
(see subject of quotation)

R

RACIAL IMBALANCE

RECORDS, ACCESS

RECORDS, MANAGEMENT

RECREATION

RED CROSS

REGISTRATION OF PUPILS

RELIGIOUS HOLIDAYS
(see also CALENDAR)

RELIGIOUS INSTRUCTION

REMEDIAL EDUCATION
(see discussion of CURRICULUM, page 33)

(X) RENTAL, EQUIPMENT
(see EQUIPMENT, RENTAL)

(X) RENTAL INCOME
(see INCOME, RENTAL)

(X) RENTAL, PROPERTY
(see PROPERTY)

(X) REPAIRS
(see BUILDINGS, REPAIRS or name of specific building)

REPORTS
(see example, page 45)

(X) RESIGNATIONS
(see SEPARATIONS)

RESOLUTIONS

RETIREMENT PLANS

*see page 26

R (Continued)

(X) RETIREMENTS
(see SEPARATIONS)

(X) REVENUE
(see INCOME)

S

SALARY SCHEDULES

(X) SALE, SURPLUS PROPERTY
(see INCOME, SALE OF PROPERTY)

SCHOLARSHIPS

SCHOOL LUNCH PROGRAM
(see also CAFETERIA)

SCHOOLS
(see specific name of school)

SEPARATIONS
(see example, page 40)

SEWERS

SITES, POSSIBLE SCHOOL

SNOW REMOVAL

SOCIAL WORK SERVICE

(X) STATE AID
(see INCOME, STATE AID)

STATE-AIDED PROGRAMS
(see also INCOME, STATE AID)

STUDENT GOVERNMENT

(X) STUDENTS
(see PUPILS)

SUBSTITUTE TEACHERS
(see also APPOINTMENTS)

SUMMER SCHOOL

S (Continued)

SUPERINTENDENT OF SCHOOLS

SUPERVISING PRINCIPAL

(X) SURETY BONDS
(see BONDS, SURETY)

T

(X) TAX ANTICIPATION NOTES
(see BONDS AND NOTES)

TAX COLLECTOR, SCHOOL

TAX EXEMPTION

(X) TAX INCOME
(see INCOME, TAXATION)

TAX RATE

TEACHER CERTIFICATION

TEACHERS

TELEPHONES

TENURE
(see discussion of APPOINTMENTS, page 37)

(X) TERMINATIONS
(see SEPARATIONS)

TEXTBOOKS

TRAFFIC

TRAINING, STAFF

TRANSPORTATION

TRAVEL

TREASURER, SCHOOL DISTRICT

TUITION
(see also INCOME, TUITION)

T (Continued)

TUTORING

U

V

VACATIONS

VOCATIONAL EDUCATION
(see discussion of CURRICULUM,
page 33)

W

WASTE DISPOSAL

WATER SUPPLY

WORKMEN'S COMPENSATION
(index also under INSURANCE
if appropriate)

(X) WORK PERMITS
(see EMPLOYMENT CERTIFICATES)

XYZ

*Authorizations, Bids, Complaints, Contracts, Correspondence, Designations, Hearings, Petitions, Purchases, and Quotations are indexed under their specific subjects. For example, purchase of buses is indexed under TRANSPORTATION -- not under purchases. A contract for refuse removal is indexed under WASTE DISPOSAL -- not under contracts.

HOW TO INDEX SOME MAJOR SUBJECTS

A board of education devotes much of its attention to certain major subjects; such as, bonds and notes, curriculum, personnel, and policy. These important areas of board concern require frequent and consistent indexing. They are given detailed analyses in the following pages, as are subjects of some complexity in indexing; such as, buildings, reports, and proper names. Examples of indexing budget and income or revenue, other major subjects, are found in the sections "Preparing Index Cards" and "Use of Modifiers," respectively.

HOW TO INDEX BONDS AND NOTES

Bonds and notes can be indexed under one of two methods: detailed or short form. Consider the frequency of bond and note issues and also the convenience of reference when determining which method to use. No matter which method is followed, entries made on BONDS AND NOTES cards should be repeated on appropriate subject cards. Examples of both the detailed and short form methods of indexing follow. (Surety bonds and performance bonds are indexed separately under BONDS, SURETY and BONDS, PERFORMANCE.)

Detailed Method of Indexing Bonds and Notes

Using a general classification all bonds and notes are indexed under BONDS AND NOTES. If the detailed method is being used, a specific modifier indicates the purpose of the bond. The type of note often indicates the purpose; i.e., tax, bond, or revenue anticipation notes. Budget and capital notes would best be indexed under their specific purpose rather than type; for example, building alterations or construction, or purchase of transportation equipment.

19__-__ BONDS AND NOTES, GOLDEN MIDDLE SCHOOL

bond, $500,000, authorized	12:03
bond, voter approval	12:96
note, $500,000, issued	13:24
bond, $500,000, issued 4/6/73	13:89

19__-__ BONDS AND NOTES, REVENUE ANTICIPATION

note issued, $400,000 11:17

19__-__ BONDS AND NOTES, TRANSPORTATION

capital note, $200,000 14:01

NOTE: Reference is facilitated by including the date of issuance on all bond entries that concern issued bonds, as bonds are often known by their issue date. This is especially helpful when bond issues are frequent or the reference is to an outstanding bond.

Short Form Method of Indexing Bonds and Notes

If the volume of bonds and notes does not require the extensive indexing of the detailed method, the short form illustrated below may be used.

19__-__ BONDS AND NOTES

Thornton Middle School, bond, $100,000	23:113
Thornton Middle School, note, $100,000	23:114
transportation equipment, bond, $200,000	24:47
Watson Elementary School, bond, $500,000	24:55
Watson Elementary School, note, $500,000	24:56
Thornton Middle School, note, renewal of, $50,000	24:73

These entries should also be repeated on the appropriate subject cards, as shown below, no matter which method is used.

19__-__ THORNTON MIDDLE SCHOOL

gymnasium alterations, estimates	23:87
gymnasium alterations, approved	23:107
bond, $100,000	23:113
note, $100,000	23:114
gymnasium contract, renegotiated	24:37
note, renewal of $50,000	24:73

19__-__ TRANSPORTATION

bus, proposals invited	23:240
bus, approval	23:299
bond, $200,000	24:47

19__-__ WATSON ELEMENTARY SCHOOL

annex approved	23:267
bond, $500,000	24:55
note, $500,000	24:56

HOW TO INDEX BUILDINGS

Entries pertaining to an individual existing school building are indexed under the name of the building, as shown in the examples below. In addition, these entries are repeated on the appropriate subject cards as indicated following each example.

19__-__ PROSPECT ELEMENTARY SCHOOL

principal, appointment	6:155
telephone extension, change of	6:165
head start program initiated	7:250

NOTE: In the above example, the entry "principal, appointment" would also be indexed under APPOINTMENTS and under the individual's name. The entry "telephone extension" would also appear under TELEPHONES; and the entry "head start program" under HEAD START PROGRAM or PRESCHOOL PROGRAMS. (See the discussion of indexing CURRICULUM, page 33.)

19__-__ GOLDEN MIDDLE SCHOOL

drug policy adopted	8:02
drug education course planned	8:33
library, microfilm reader purchased	8:35

NOTE: In the previous example, the "drug policy" and the "drug education course" entry might also appear under DRUGS, PROGRAM or POLICY, DRUGS. If an index card had been created for CURRICULUM, DRUGS, the entry "drug education course" would appear there also. The entry "library microfilm readers" would be found both under LIBRARY and under MICROFILM EQUIPMENT, since purchases are indexed under the name of the item or type of item purchased.

Construction of New Buildings

When a new building is being planned or is being constructed, it often has not yet been given its final name. In such a case, a readily identifiable temporary designation probably has already been given the building. This can be used for the index heading.

19__-__ BLUE RIDGE PROPOSED ELEMENTARY SCHOOL

petition, Blue Ridge Improvement Association	22:26
site approval	22:185
bond, $1,000,000, authorized	23:25

An alternative method is to index all new buildings under BUILDINGS, CONSTRUCTION. Such a heading would normally include general proposals, studies, and planning for construction before it becomes specific enough to be indexed separately. If new building construction is indexed under this heading a "see also" cross-reference must be created when the new building is completed and a name assigned.

An example of this alternative is found on the following page.

32

19__-__ BUILDINGS, CONSTRUCTION

Blue Ridge elementary school,
site approval 22:185
Blue Ridge elementary school,
bond $1,000,000 authorized 23:25

NOTE: In the above examples, the entry "site approval" would also be found under SITES, POSSIBLE SCHOOL and the entry concerning bond authorization would also be found under BONDS AND NOTES, BLUE RIDGE PROPOSED ELEMENTARY SCHOOL. (See the section "Preparing Cross-Reference Cards" on page 17, for the method to be used in creating cross-reference cards when the building is given its permanent name.)

To complete the indexing of buildings, a cross-reference card should be prepared on which are listed, by name, all the buildings in the district.

BUILDINGS

see:

Avendorp Elementary School
Blue Ridge Elementary School
City High School
Golden Middle School
Prospect Elementary School
Thornton Middle School
Watson Elementary School

HOW TO INDEX CURRICULUM AND DEPARTMENTS

A major concern of the board of education will be the curriculum. Currently, many educators feel that curriculum includes all of the many activities that make up the total in-school experience of the student. Thus, homeroom, study hall, and lunchroom experiences would be considered curriculum along with the more formal courses of study. Curriculum would also include those programs which are frequently called extracurricular or cocurricular; such as athletics, band, clubs, dramatics, yearbook, etc.

It is important when starting to index to determine a logical and consistent method of classifying these various aspects of curriculum and to maintain it throughout. Two possible methods are discussed below.

Method 1.

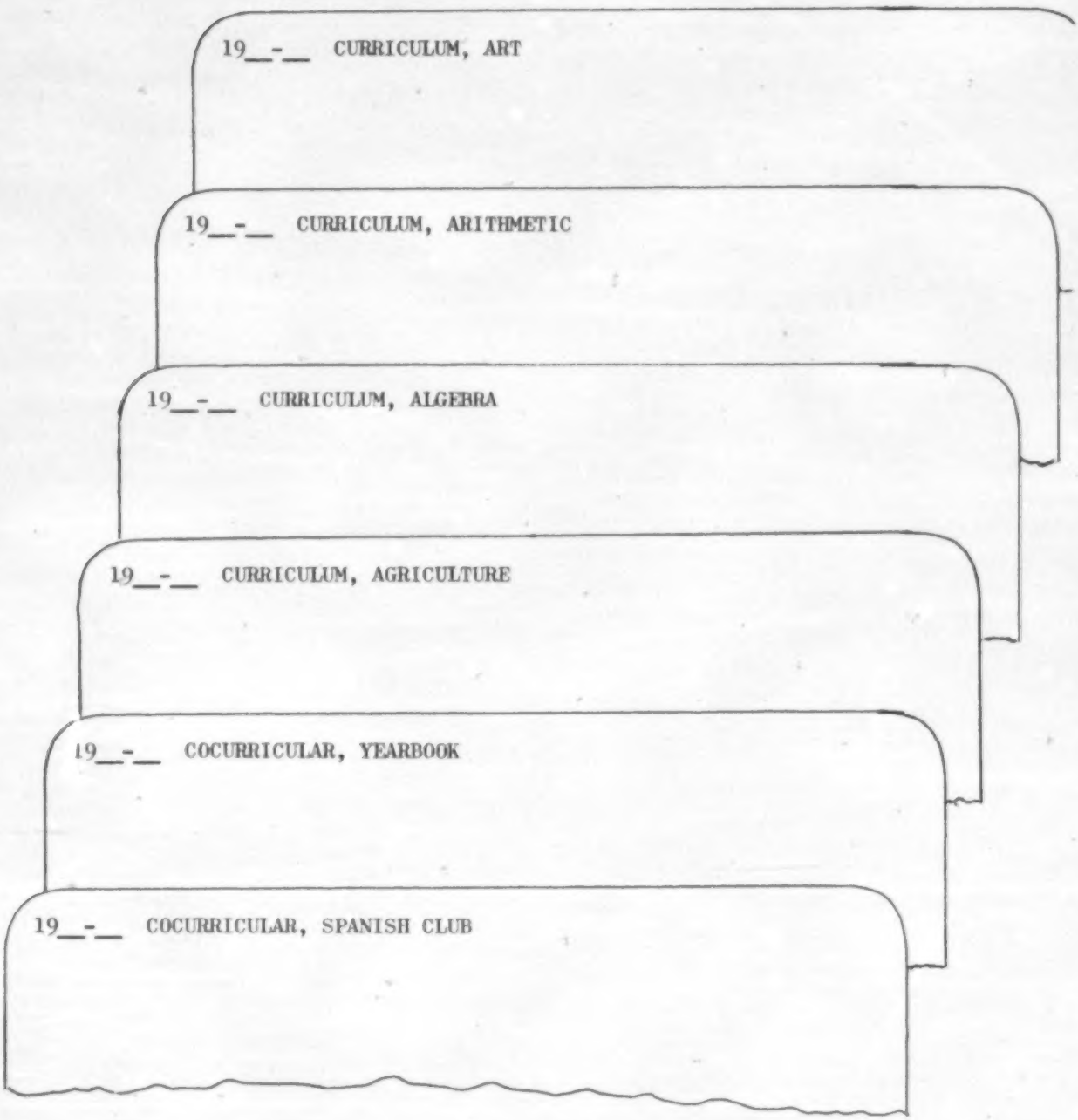
Under the heading CURRICULUM would be courses of study or anything for which a syllabus is required. This would include individual subjects, major sequences, and programs (whether one course or several related ones). Those activities which are frequently called extracurricular or cocurricular would be so designated with the heading EXTRACURRICULAR or COCURRICULAR.

For example: approval of a physical education course syllabus would be indexed under CURRICULUM, PHYSICAL EDUCATION; approval of an intramural wrestling tournament would be found under COCURRICULAR, INTRAMURAL WRESTLING. Board action regarding music courses would be indexed under CURRICULUM, MUSIC; approval of a trip by the band under COCURRICULAR, BAND.

Special courses and programs would be indexed under CURRICULUM. Examples of these are adult, evening, or continuing education programs; drug education; head start or other preschool programs; special programs for the disadvantaged or disabled; remedial programs; and so forth.

The advantage of this method is that all curriculum entries will appear on index cards filed under the general heading CURRICULUM. Use of specific modifiers can create as many other subject headings and index cards as necessary, all of which will be gathered for easy reference. Similarly, all cocurricular activities will be gathered under the general heading COCURRICULAR with as many specific index cards as necessary. Once a searcher becomes familiar with this method it is easy to find an entry without knowing the exact title of the course, program, or activity.

An example of how a section of the card file would look if this method was used is shown below.



Method 2.

An alternate method would simply use the name of the course, program, or activity as the subject heading. Using the examples previously cited, index cards would be headed PHYSICAL EDUCATION; WRESTLING, INTRAMURAL; MUSIC EDUCATION; and BAND

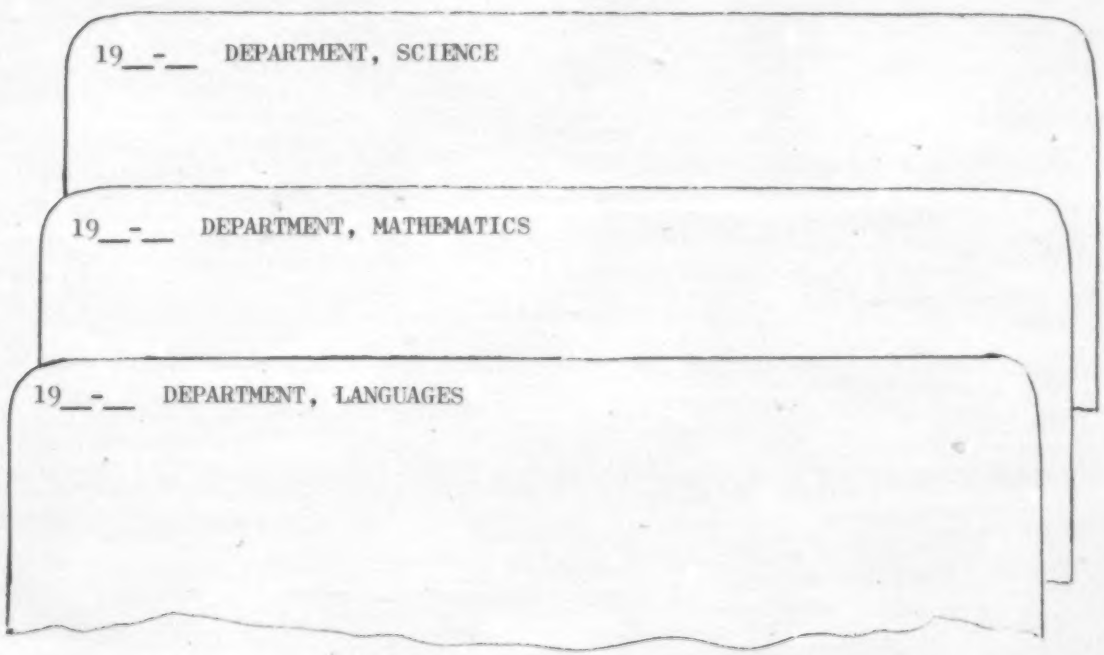
The heading CURRICULUM would be used only for entries that concern the overall curriculum or extensive portions of it, as would the heading COCURRICULAR for nonacademic activities.

This method appears simple to use but it has a major difficulty. The exact subject heading used must be known when searching. Otherwise, excessive time would be spent and the possibility of overlooking a reference exists.

Indexing Departments

Closely related to curriculum are the departments of instruction. Curriculum entries deal primarily with the consideration, approval, and content of courses or programs. Department entries would usually be concerned with administration and personnel. When a board action assigns responsibility for a particular course or program to a department, an entry would be appropriate under either department or curriculum or both.

Departments would be indexed under the subject heading DEPARTMENT with a modifier indicating the particular one involved; i.e. DEPARTMENT, ENGLISH or DEPARTMENT, SCIENCE.



HOW TO INDEX PERSONNEL

Many of the actions of the board will concern personnel, either individually or collectively. It is important to standardize the indexing of these activities so that an index user can quickly locate all pertinent references.

Actions Concerning Groups

Actions that affect personnel collectively usually are concerned with such areas as: policy, negotiations, fringe benefits, retirement plans, salary schedules, and employee organizations and associations. Adding modifiers to the general subject heading, PERSONNEL, appropriate index cards would read: PERSONNEL, POLICY; PERSONNEL, NEGOTIATIONS; PERSONNEL, FRINGE BENEFITS; PERSONNEL, RETIREMENT PLANS; etc.

It may be advisable, in some cases, to cross-reference a subject heading constructed as above to another index heading under which the relevant entries will actually be found. For instance, PERSONNEL, POLICY might be cross-referenced to POLICY, PERSONNEL so that all school board policy actions are grouped together.

In order to be consistent it will sometimes be necessary to cross-reference from a frequently used subject heading to the PERSONNEL grouping. Thus, SALARY SCHEDULES would be cross-referenced to PERSONNEL, SALARY SCHEDULES. However, if it is felt that SALARY SCHEDULES is the more commonly used or significant heading, the cross-reference would be from PERSONNEL, SALARY SCHEDULES to it.

Actions Concerning Individuals

Actions that affect only one individual are numerous. They are most often appointments, promotions or other changes of status, leaves of absence, or separations but could concern disciplinary charges, hearings, or grievance procedures.

As a general rule any proper name (other than a board member) mentioned in the minutes should be indexed. Applying this rule to all the appointments, separations. etc. the board deals with and creating an index card for each might be feasible in a small district or where there are few personnel actions recorded in the minutes. However, in many districts creation of an index card for each employee named would crowd the index and hinder searches for other subject headings. In order to prevent this all actions of a particular type could be collected under one heading or a series of related headings, as shown in the examples for indexing appointments that follow.

How to Index Appointments

Determination of the particular method to use in indexing appointments depends on school practices and the volume to be indexed. The amount of information to be included in an entry was discussed generally on page 11 in the section on "Selecting Entries." It may be sufficient to enter the individual's name only. Some districts have entered the name, title of job, and type and date of appointment. This seems excessive. The purpose of an index is to point to where the information may be found, not to duplicate the information recorded in the minutes. Local practice may indicate the need for information in addition to the name, but this should be kept to a minimum. (Note that the example on page 44 showing how to index "Names of Individuals" gives more information than the appointee's name.)

Method 1.

The simplest method used is to have one card with the heading APPOINTMENTS and list all as they occur. An example of this method is shown below.

19__-__ APPOINTMENTS

French, Arthur	3:24
Huxley, John	3:24
Smith, Janet	3:24
Warren, Joseph	3:24
Lembeck, Ambrose	3:72
Naldrett, William	3:73
Smith, Janet	4:05

Note that the name Janet Smith appears twice. This is because the first appointment was temporary and the second permanent. This may be confusing to a searcher. In the examples given for Method 2 this information forms part of the entry. The use of selected additional information may clarify a reference, as indication of the type of appointment would in this case.

Method 2.

It is also possible to group appointments by class of employee, whether nonprofessional or professional. Or they could be collected by area of work such as teaching, administrative, cafeteria, custodial, etc. For example, all custodial appointments, whether temporary, permanent, part-time, or other, would be on one index card. The same would be true of all teaching appointments, as shown in the following examples, in which the entry includes type of appointment.

19__-__ APPOINTMENTS, NONPROFESSIONAL

French, Arthur, permanent	3:24
Smith, Janet, probationary	3:24
Naldrett, William, permanent	3:73
Smith, Janet, permanent	4:05
Murphy, Alice, temporary	4:07

or,

19__-__ APPOINTMENTS, CUSTODIAL

Smith, Janet, probationary	3:24
Naldrett, William, permanent	3:73
Smith, Janet, permanent	4:05

and,

19__-__ APPOINTMENTS, TEACHING

Huxley, John, probationary	3:24
Jones, Alice, tenure	4:17
Hawkins, James, substitute	4:34

Method 3.

Another detailed method of indexing appointments is to collect all actions of a particular type together. Cards could be headed APPOINTMENTS, TEMPORARY; APPOINTMENTS, PERMANENT; APPOINTMENTS, TENURE: APPOINTMENTS, PROMOTION; and APPOINTMENTS, PART-TIME.

Examples of this method follow.

19__-__ APPOINTMENTS, PROBATIONARY

Smith, Janet	3:24
Warren Joseph	3:24
Lembeck, Ambrose	3:72

19__-__ APPOINTMENTS, PERMANENT

French, Arthur	3:24
Naldrett, William	3:73
Smith, Janet	4:05

and,

19__-__ APPOINTMENTS, TENURE

Jones, Alice	4:17
Barcsz, Ann	6:12
Tartar, Mavis	6:12

NOTE: It is important that the indexer be consistent in whichever method is chosen and that cross-references be created as needed to insure that all information is indexed and easily located by the index user.

Indexing Other Actions Concerning Individuals

Separations can be either grouped together on one index card headed SEPARATIONS or modified by type such as, resignation, retirement, or discharge. Index cards would then be headed SEPARATIONS, RESIGNATION; SEPARATIONS, RETIREMENT; or SEPARATIONS, DISCHARGES.

Leaves of absence, disciplinary charges or hearings, grievance procedures, and other actions concerning personnel should be indexed separately in the same manner shown for actions concerning groups. Note that promotions were indexed under APPOINTMENTS.

Certain personnel, especially school officers, such as principal or superintendent, treasurer, and clerk will have index cards under their office title. These cards are for actions concerning the office itself or the incumbent because he holds that particular office. Entries that reflect personnel actions that concern the individual as employee should be found on the appropriate index cards as indicated above.

HOW TO INDEX POLICY

Determination and promulgation of policy or regulations is one of the more important functions of the board of education. These should be gathered in a policy manual or book. Many school districts use a policy indexing system with numerical codes preassigned to subjects grouped into such major categories as personnel, instruction, students, administration, etc. Each policy or regulation then has a code number by which it can readily be identified and which determines its place in the policy manual.

This is a useful method of organizing policy. If such a system is used, however, it should not be transported into the indexing of policy actions that appear in the minutes. The policy code number can be integrated into the entry for ease of reference but it should not be the sole entry nor the subject heading of individual index cards.

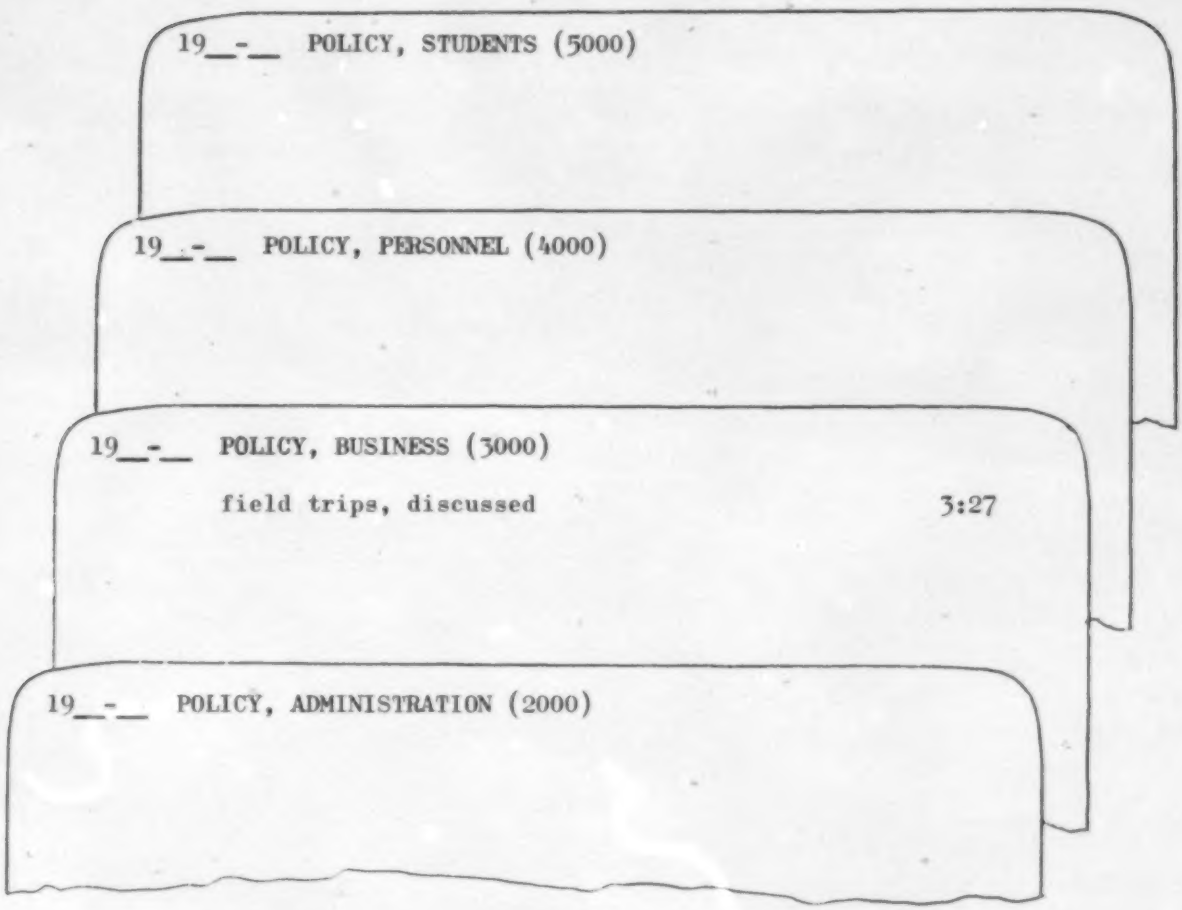
The proper method of indexing policy depends on the quantity of such actions the board of education undertakes. If infrequent, one card headed POLICY will suffice, as shown in the following example.

19__-__ POLICY

visitors, approved (1240)	3:23
drug use, approved (6164)	3:23
field trips, discussed (3545)	3:27
school records access, revised (1350)	3:29

Note that the appropriate policy code number is included as is a word indicating the nature of the action taken. Again, the index is a reference tool; it is not meant to supply all the information contained in the minutes itself. Therefore, the code number could be omitted. It is included here to assist reference to the policy manual.

If policy actions are frequent they could be grouped by the general categories used in a policy code system and mentioned earlier.


19__-__ POLICY, STUDENTS (5000)
19__-__ POLICY, PERSONNEL (4000)
19__-__ POLICY, BUSINESS (3000)
field trips, discussed 3:27
19__-__ POLICY, ADMINISTRATION (2000)

Note that the policy system number, if used, forms part of the subject heading but that the subject heading without the code number is sufficient in itself to guide the indexer or searcher to the proper card.

HOW TO INDEX PROPER NAMES

Names of Firms

References in the minutes to firm names should be indexed in accordance with the rules for alphabetizing proper names given in Appendix A, page 55. The cards reproduced below show the proper alphabetizing of two common types of firm names.

19__-__ BUCKLEY HEATING AND VENTILATING COMPANY

heating contract, Golden Middle School	23:146
air conditioning contract, Administration Building	24:186

19__-__ SMITH, JAMES A., COMPANY

heating contract, Golden Middle School	23:146
air conditioning contract, Administration Building	24:186

The entries indexed under the firm names are also indexed under the other subjects contained in each entry, for example:

19__-__ GOLDEN MIDDLE SCHOOL

heating contract, awarded	23:146

19__-__	ADMINISTRATION BUILDING	
	air conditioning contract, awarded	24:186

Names of Individuals

The example below shows the proper method of indexing the name of a person. The indexer should also refer to the rules for alphabetizing, Appendix A, page 55.

19__-__	SMITH, JANET M.	
	appointed probationary matron	3:24

In addition, an entry indexed under the name of an individual should also be indexed under its other appropriate subjects -- in this example, APPOINTMENTS, NONPROFESSIONAL. (See page 37 for discussion of indexing appointments.)

19__-__	APPOINTMENTS, NONPROFESSIONAL	
	Rogers, John A., bus driver	2:35
	Thompson, George D., bus driver	2:35
	Smith, Janet M., probationary matron	3:24
	Allen, Elmer E., custodian	3:62

HOW TO INDEX REPORTS

There are many reports presented to the board for consideration. These are generally of two types:

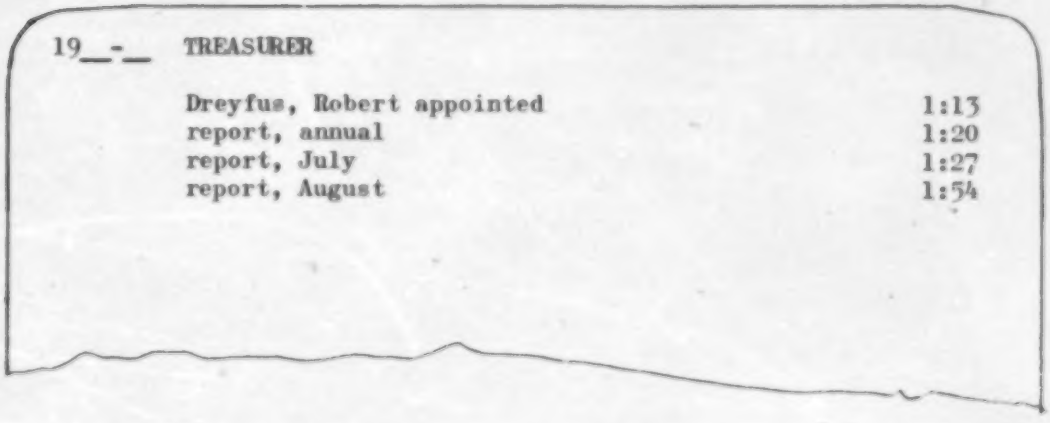
1. Frequent and periodic reports made as part of the normal responsibilities of such officers as the treasurer, auditor, cafeteria manager, and committees such as the building committee.

2. Single-instance or infrequent reports for special purposes, such as those of an outside consultant or ad hoc committee.

A user of the index might look for information under the subject of the report, the reporter, or the general heading REPORTS.

In the case of standing officers or committees reporting periodically the first reference point searched would probably be the reporter — the treasurer, auditor, or whatever — as there would usually be an index card for this officer or committee.

Therefore, entries for this type report should be posted on this index card for the officer or committee reporting, as shown below.



19__-__ TREASURER

Dreyfus, Robert appointed	1:13
report, annual	1:20
report, July	1:27
report, August	1:54

The subject of the report is generally easily discernible from the title of the officer or committee. A separate card for the subject is not necessary. However, it would be appropriate to have a cross-reference index card with the subject heading REPORTS, REGULAR. This

card would be similar to the one discussed in the section on indexing BUILDINGS. It would list those officers and committees that regularly submit reports and have existing index cards.

Example.

REPORTS, REGULAR

see AUDITOR
BUSINESS MANAGER
CAFETERIA MANAGER
TREASURER
BUILDING COMMITTEE

NOTE: The entry, BUILDING COMMITTEE, seems to be out of place alphabetically. Since the committee was set up and the first report submitted after the cross-reference card was created, its entry necessarily follows. The alternative is to remake the card to keep the alphabetical arrangement each time you wish to add another regular reporter.

Reports of single-instance special committees, commissions, or outside consultants can be grouped under the heading REPORTS, SPECIAL. There would also be an index card for the special committee, consultant, etc. Examples of this method follow:

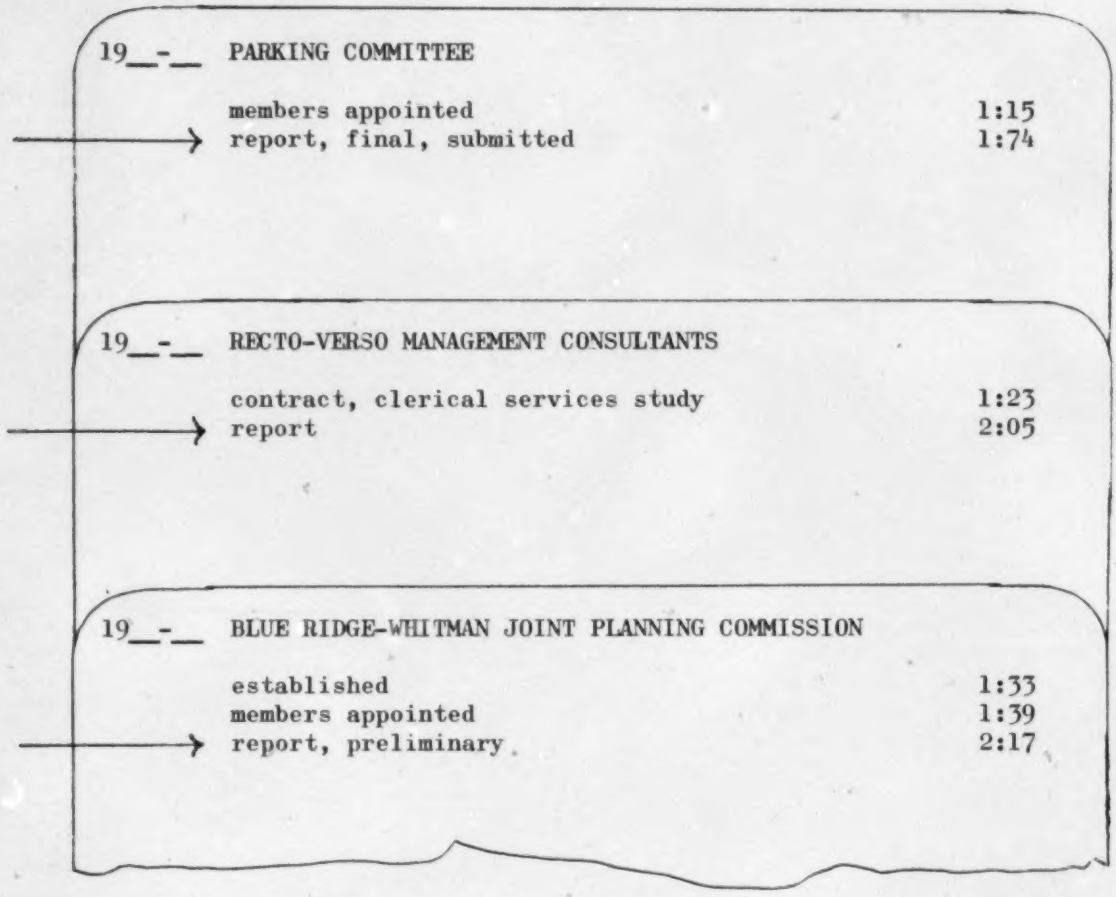
The cumulative index card.

19__-__ REPORTS, SPECIAL

parking committee	1:74
Recto-Verso Management Consultants	2:05
Blue Ridge-Whitman joint planning commission	2:17

The arrows superimposed on the preceding cumulative card and on the examples below show how the same reports are indexed on the different cards.

Cards of the special committees, consultants, etc. showing the entries for their reports.



NOTE: Committees, consultants, and commissions are indexed under their own name. For easy reference a cross-reference card, such as the one created for REPORTS, REGULAR, can be prepared listing all committees, commissions, and consultants for which index cards have been prepared.

In some cases the subject of the report is indicated in the title of the reporter; for example, PARKING COMMITTEE. With others the title of the committee or consultant does not indicate the subject of the report. Therefore, a cross-reference card should be created with an appropriate subject heading. Recto-Verso Management Consultants were hired to determine if clerical staff in administrative offices were being used efficiently.

A cross-reference card would look like this:

19__-__ CLERICAL SERVICES, STUDY

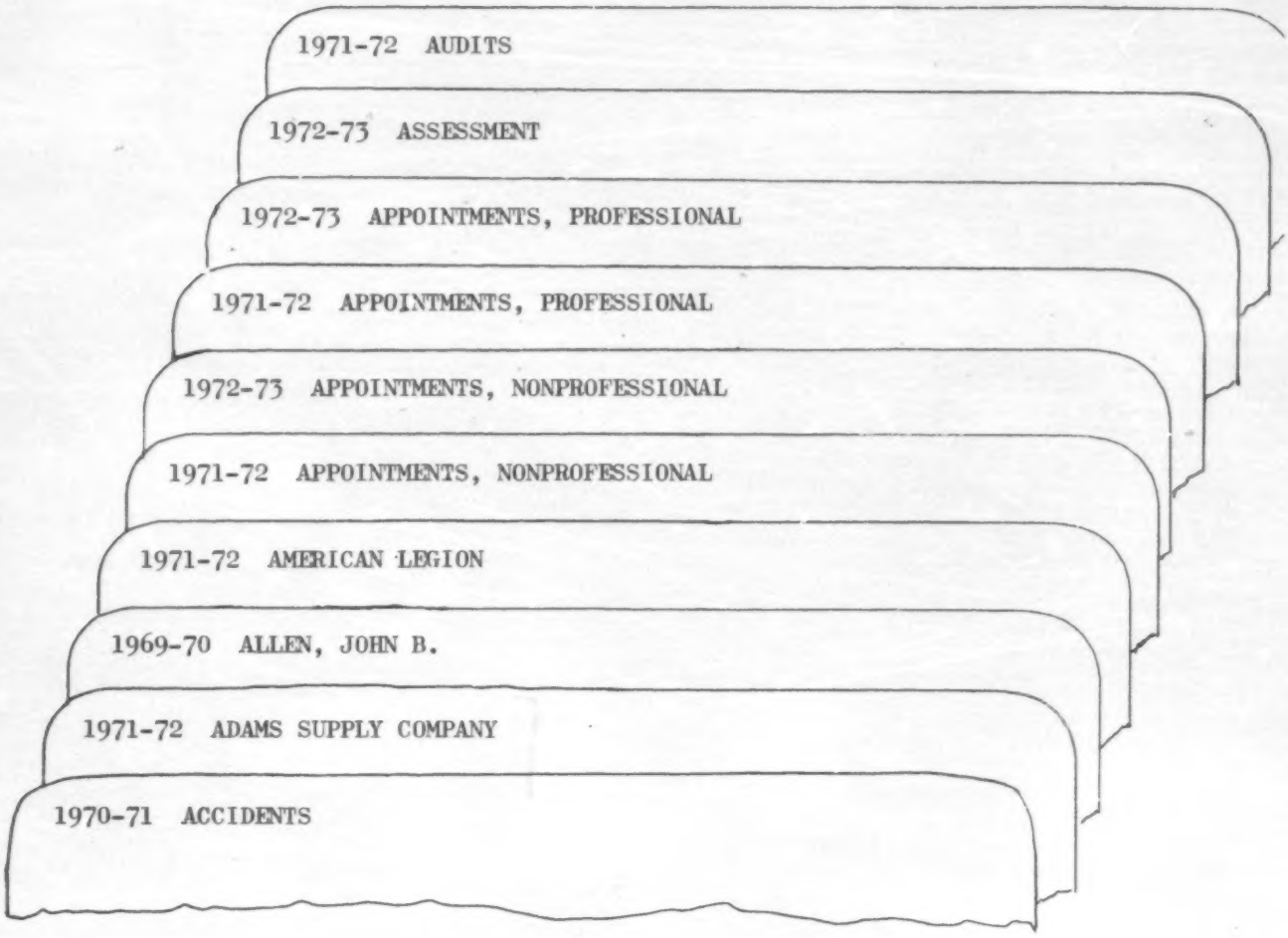
see RECTO-VERSO MANAGEMENT CONSULTANTS

Indexing reports in this way gives adequate reference points to the reporter and the subject of the report as well as to the general heading REPORTS without creating unnecessary duplication.

SETTING UP THE CUMULATIVE INDEX

The cumulative index consists of the index cards prepared for all volumes of years prior to the current year. In other words, the index for 1972-73 becomes a part of the cumulative index in 1973-74.

The cumulative index is constructed by interfiling the index cards for the various past years in alphabetical and chronological order as shown in the illustration below.

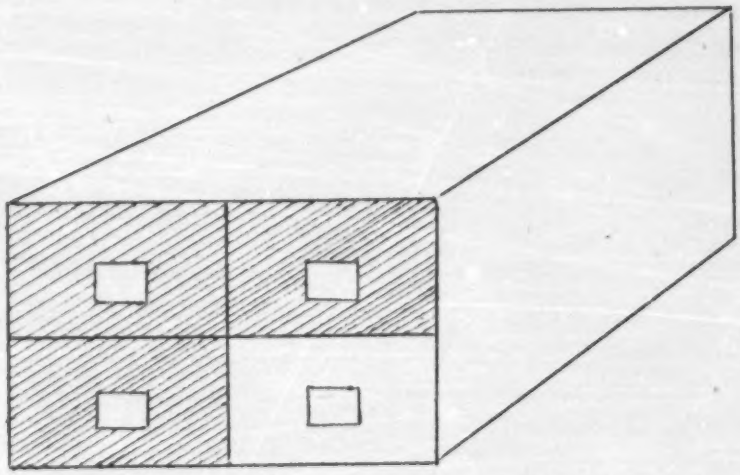


As shown in the example, identically captioned cards are interfiled in chronological order beginning with the earliest year.

In setting up the cumulative index it will be necessary to make another set of guide cards and additional end guides. This will have to be done only once, but it may be necessary later to insert additional third position guide cards and end guides as new major subjects are interfiled in the cumulative index.

When the cumulative index is set up it will also be necessary to prepare an additional set of cross-reference cards and to insert them at the correct alphabetical locations in the cumulative index.

The diagram below illustrates the current and cumulative parts of the index after cards have been placed in file drawers.



Shaded areas represent cumulative index drawers.
Unshaded area represents current index drawer.

The chart below indicates the steps required to establish the two parts of the index card file — the current and the cumulative.

	First Year	Second Year	Third Year	Succeeding Years
STEP 1	Construct index currently during the year.	Remove index constructed for the first year and place it in an index drawer labeled "Cumulative Index."	Consolidate indexes constructed in first and second years by interfiling in Cumulative Index drawer.	Consolidate all previous indexes by interfiling in cumulative index drawer(s).
STEP 2		Construct index currently for the year.	Construct index currently for the year.	Construct index currently for the year.

HOW TO CONVERT THE INDEX FROM CARD TO BOOK FORM

A unique feature of a card index is that it can be periodically converted to a conventional book-type index. At times this may be highly desirable since it permits utilization of the best features of both, namely, the flexibility of arrangement and ease of reference afforded by the card index and the compactness of the book index.

It is quite possible that over a period of time the accumulation of cards in the cumulative index drawers will become voluminous. At the same time the frequency of reference to the older cards in the cumulative index will generally decline. For these reasons a means of periodically converting the cards in the cumulative index to the more compact book form should not be overlooked.

The conversion of the index from cards to page form can be accomplished by either of two methods.

Cards in the cumulative index can be transcribed manually into page form by typing the entries from the cards onto pages. Care must be taken to type the cards in the same order in which they appear in the cumulative index. Transcribed pages should be carefully compared with the cards to eliminate typographical errors.

A far easier and quicker method is to convert the cards to page form by photographing or photostating them. This method also eliminates the possibility of typographical errors often made in a typed transcription.

To convert the card index to a book index by this method it is necessary only to lay out the cards as shown on page 53 and photostat or photocopy them. The number of cards that can be placed on a page will be determined by three factors: (1) size of page used; (2) size of index card used; and, (3) number of lines occupied by entries on each index card.

If the cumulative index has been set up as explained on pages 49 to 51, the cards will be in alphabetical and chronological order. When preparing the cards for photostating or photocopying in page form, it is necessary only to place the first card in the cumulative index at the top of the sheet of paper used as a guide for page size and arrange succeeding cards from that point down. When doing this, make certain that each succeeding card is placed just below the last entry on the previous card as shown in the example on the following page.

1971-72 AUDITS

.....(entry).....	00:00
.....(entry).....	00:00
.....(entry).....	00:00
.....(entry).....	00:00
....(last entry on card)...	00:00

1972-73 AUDITS

.....(entry).....	00:00
.....(entry).....	00:00
.....(entry).....	00:00
.....(entry).....	00:00
.....(entry).....	00:00
....(last entry on card)...	00:00

1972-73 AUGUSTINE, HARRY J

.....(entry).....	00:00
.....(entry).....	00:00
....(last entry on card)...	00:00

1971-72 AVENDORP ELEMENTARY SCHOOL

.....(entry).....	00:00
.....(entry).....	00:00
.....(entry).....	00:00
.....(entry).....	00:00
.....(entry).....	00:00
.....(entry).....	00:00
....(last entry on card)...	00:00

1972-73 AVENDORP WATER DISTRICT

.....(entry).....	00:00
.....(entry).....	00:00
....(last entry on card)...	00:00

1971-72 BANKS

.....(entry).....	00:00
.....(entry).....	00:00
.....(entry).....	00:00
.....(entry).....	00:00

This is an example of index cards arranged in proper order to photograph or photostat in page form.

The question of when and how often to convert the index cards into a book form of index must be determined locally. If an index in page form for each minute book is desired, it is necessary merely to type or reproduce by photograph or photostat the cards that index that book. If, on the other hand, it is desired to prepare in page form a periodic index covering several years of minute books, it will be necessary to accumulate the index cards covering the minutes for that period and then proceed as described above. Larger school districts having relatively more complex minutes may find it desirable to prepare a periodic index in book form every five years. Smaller districts with less voluminous minutes may decide to retain the index in card form for ten years or longer before converting it to the book form of index. The length of time the index remains in card form will probably be determined to a large extent by the volume of index cards.

APPENDIX A

SOME SIMPLE RULES FOR ALPHABETIZING

Rule 1. The name of an individual is alphabetized by the first letter of the surname in the following order: (1) surname, (2) given name(s) or initials. Thus John J. Brown is alphabetized Brown, John J.

Rule 2. A surname containing a prefix, such as d', de, Mc, Mac, Van, von, etc., is considered as one word and is alphabetized according to the first letter of the prefix. Thus Mac Bride is alphabetized before Mc Bride, Van Zandt before von Elm, and d'Amico before De Meo.

Rule 3. A given name expressed only as an initial is alphabetized before a name beginning with the same letter as the initial. Likewise, a surname with only one given name precedes the same name having a middle initial or name. The application of Rule 3 is illustrated in this example:

(1) Baker, N.
(2) Baker, N. S.
(3) Baker, N. Scott
(4) Baker, Neal
(5) Baker, Neal S.
(6) Baker, Neal Scott

The above rule is known as the "nothing before something" rule and applies equally to subjects other than proper names, as shown in the following example:

(1) Appointments
(2) Appointments, Teaching
(3) Appointments, Teaching Substitutes

Rule 4. Firm names and names or titles of institutions and associations that do <u>not</u> contain the full name of an individual are alphabetized as written, for example: Grace Methodist Church, P-D Supply Company, National Garage, Smith Oil Company.

Rule 5. Names of institutions, associations, and firms that contain the full name (or surname and/or initials) of an individual are alphabetized in the following order: (1) surname, (2) given name(s) or initials, (3) remainder of firm name or title. Therefore, A. Buckley, Incorporated is alphabetized as Buckley, A., Incorporated whereas Smith Oil Company, because it does not contain the full name or surname and initials of an individual is alphabetized as written -- Smith Oil Company.

Rule 6. Disregard the article "the" in a firm name or title of an institution or association and place it in parentheses at the end of the title when alphabetizing. For example, The Albany News is alphabetized as Albany News (The); The Statler is alphabetized as Statler (The).

NOTE: A useful manual for any indexer is the Guides to Selecting and Alphabetizing Entries for a Name Index available from the State Archives.

APPENDIX B

OTHER METHODS OF VOLUME AND PAGE IDENTIFICATION

There are numerous systems that can be used to identify minute books by volume and page. The method used in this manual can easily be adapted to any method favored by a particular district. The following examples show several other common ways of volume and page identification.

Example 1.

In this example the volumes are identified only by inclusive dates which are generally marked on the spine of the book. The beginning date of the first volume for which entries appear on the card is inserted in the upper left corner of the card on the same line as the heading. If a succeeding volume is to be indexed on the same card, insert its beginning date 2 spaces from the left margin of the card and 2 lines below the last previous entry. The first entry for this new volume should be started 2 lines below the beginning date of the volume.

7-1-72	PERSONNEL, LEAVES OF ABSENCE	
	Scudder, Paul	187
	Rafferty, Anne	196
	Kelly, Richard	209
1-1-73	Yates, Abraham	28
	McDonald, Isabel	97
	Chino, Anne	134

Note that only the page number appears in the right hand column since the beginning date of each volume has been inserted 2 spaces from the left margin of the card.

Example 2.

In this example, the volumes are identified only by letters in alphabetical order, the letter "A" designating the first, or earliest, volume. Two volumes are cited in the example below, volume "G" and volume "H". The first volume created in the succeeding year would be lettered "I".

19__-__ PERSONNEL, LEAVES OF ABSENCE

Scudder, Paul	G:187
Rafferty, Anne	G:196
Kelly, Richard	G:209
Yates, Abraham	H:28
McDonald, Isabel	H:97
Chino, Anne	H:134

Example 3.

In this example, the first volume created each year is lettered "A" and subsequent volumes are lettered in alphabetical order. The only difference in this method and that described in example 2 is that each year the first volume is designated volume "A".

1972-73 PERSONNEL, LEAVES OF ABSENCE

Scudder, Paul	A:187
Rafferty, Anne	A:196
Kelly, Richard	A:209
Yates, Abraham	B:28
McDonald, Isabel	B:97

1973-74 PERSONNEL, LEAVES OF ABSENCE

Ling, A. L.	A:182
Turtle, John	A:190
Brandon, James	B:45